EXHIBIT 300   **UII 016-000002139**

Exhibit 300: Capital Asset Summary

Part I: Summary Information And Justification (All Capital Assets)

Section A: Overview & Summary Information

Date Investment First Submitted: 2009-06-30
Date of Last Change to Activities: 2012-08-27
Investment Auto Submission Date: 2012-02-28
Date of Last Investment Detail Update: 2012-02-28
Date of Last Exhibit 300A Update: 2012-02-28
Date of Last Revision: 2012-08-27

Agency: 016 - Social Security Administration   **Bureau:** 00 - Agency-Wide Activity

Investment Part Code: 01

Investment Category: 00 - Agency Investments

1. Name of this Investment: Citizen Access Routing Enterprise through 2020-CARE 2020

2. Unique Investment Identifier (UII): 016-000002139

Section B: Investment Detail

1. **Provide a brief summary of the investment, including a brief description of the related benefit to the mission delivery and management support areas, and the primary beneficiary(ies) of the investment. Include an explanation of any dependencies between this investment and other investments.**

   Citizen Access Routing Enterprise (CARE) through 2020 is a Social Security Administration (SSA) service contract that will provide the public with continued access to automation and agent services on its national toll free number. The national toll free number is utilized by the public to make inquiries on their social security claims and benefits. The CARE through 2020 service contract replaces two expiring contracts (Call Center Network Solution and the FTS2001 contract National 800 Number Network) with a single General Service Administration (GSA) Networx Universal contract. Approximately 80 million calls are placed to SSA's National 800 number annually. As the baby boomer generation ages, the number of people entering into their retirement and disability-prone years will rapidly increase, significantly impacting Social Security's toll free number. CARE through 2020 will provide the same services as the existing contracts but with newer technology that will position SSA to handle call volume increases and offer the potential to improve performance goals such as Average Speed of Answer, Agent Busy Rate, and Annual Service Satisfaction. CARE through 2020 will be an Internet Protocol (IP)-based network designed to support future service enhancements such as Click to Talk, Screen Sharing, and Instant Messaging. These currently unfunded future initiatives would provide the public with additional channels for communicating with SSA. CARE through 2020 will also include an enhanced reporting system to provide management information (MI) for reviewing and improving performance on

EXHIBIT 300   **UII 016-000002139**

a regular basis. Information will be captured from the moment a call is answered by the network until the call is disconnected. SSA's mission to ensure equal access requires the automation services and the option to speak with a call center agent continue to exist into the foreseeable future.

2. **How does this investment close in part or in whole any identified performance gap in support of the mission delivery and management support areas? Include an assessment of the program impact if this investment isn't fully funded.**

Recognizing the impact of an aging population and the importance of transforming customer services, SSA has identified enhancing the National 800 Number telephone service as a main objective in Strategic Goal 3 of the SSA Agency Strategic Plan for Fiscal Years (FY) 2008-2013. CARE through 2020 directly supports this objective by positioning the agency to handle expected increases in call volume and to potentially support future enhancements that would provide the public with additional options for communicating with SSA, such as enabling website visitors to interact with a telephone agent to help conduct their business while online. CARE through 2020 will continue to achieve target rates for the Average Speed of Answer and Agent Busy Rate in the National 800 Number performance goals. Furthermore, CARE through 2020 will continue to work at meeting its Annual Service Satisfaction targets as outlined in SSA's Annual Performance Plan. The existing contracts for 800 Number service cannot be extended indefinitely. Without CARE through 2020, SSA's National 800 Number would be in jeopardy. Without a National 800 Number SSA's local field offices would receive all calls from the public. This influx of calls would overwhelm the resources available in the field offices, and ultimately degrade SSA's services, performance, and customer satisfaction.

3. **Provide a list of this investment's accomplishments in the prior year (PY), including projects or useful components/project segments completed, new functionality added, or operational efficiency achieved.**

In FY2011, SSA senior leadership assembled a Program Management team to implement and manage the new contract. The CARE through 2020 program team conducted several transition activities for the new service contract. SSA finalized the requirements discovery/validation and design phase, and submitted the majority of required task orders to the contractor. Cages, racks and power have been installed at the four Internet Data Centers (IDCs), and the Wide Area Network (WAN)/Local Area Network (LAN), Firewall and Gateway configurations are complete. The Implementation Team conducted initial site surveys at all SSA Teleservice Center (TSC) and co-located Program Service Center (PSC) locations, and subsequently completed all engineering reviews. Per the November 2010 Techstat Review, SSA established a Management Council to receive end-user input and feedback on the process.

4. **Provide a list of planned accomplishments for current year (CY) and budget year (BY).**

In FY2012, CARE through 2020 will complete the Network transition from the current vendor's network to the new vendor's solution. The most critical step in transition will be completing the four IDCs, which are the core of the CARE through 2020 infrastructure and are necessary to complete any other transition activities. Once the IDCs are available, CARE

EXHIBIT 300   **UII 016-000002139**

through 2020 will complete extensive testing and validation in order to confirm that the routing capabilities are functional. Working in parallel, SSA will complete the required MI Reporting solution, which will include the recommendations from the audit conducted by the OIG; "The Effectiveness of the Social Security Administration's 800-Number Automation Service." The new MI solution will collect caller-level data for callers who use the automated system, allowing SSA to track the calls from cradle to grave including the disposition of the call. TSC transition activities will include installing new equipment, re-cabling sites where necessary and training agents and supervisors prior to cutover. The applicable hardware and software supporting the new solution will be Section 508 compliant and individual training will be offered to all agents and supervisors with disabilities. Also in FY2012, if adequate resources are available, CARE through 2020 will begin to identify the specific tools/features that would meet the growing demands of the public to transact business with SSA by using the communication channel of their choice, such as the Click to Talk feature. By FY2013, CARE through 2020 will have finalized the network transition, and begin to provide maintenance and operations support to the call center. SSA will then begin to analyze and incorporate incremental improvements to the automated applications. CARE through 2020 will conduct P&A for future initiatives such as Click to Talk.   This unfunded future option will provide the public with additional channels for communicating with SSA.

5. **Provide the date of the Charter establishing the required Integrated Program Team (IPT) for this investment. An IPT must always include, but is not limited to: a qualified fully-dedicated IT program manager, a contract specialist, an information technology specialist, a security specialist and a business process owner before OMB will approve this program investment budget. IT Program Manager, Business Process Owner and Contract Specialist must be Government Employees.**

2011-09-09

EXHIBIT 300

UII 016-000002139

Section C: Summary of Funding (Budget Authority for Capital Assets)

1.

Table I.C.1 Summary of Funding				
	PY-1 & Prior	PY 2011	CY 2012	BY 2013
Planning Costs:	$0.2	$0.0	$0.0	$0.0
DME (Excluding Planning) Costs:	$0.5	$103.1	$23.9	$8.2
DME (Including Planning) Govt. FTEs:	$1.1	$0.8	$1.3	$0.3
Sub-Total DME (Including Govt. FTE):	$1.8	$103.9	$25.2	$8.5
O & M Costs:	$0.0	$0.0	$0.0	$32.7
O & M Govt. FTEs:	$0.0	$0.0	$0.0	$1.1
Sub-Total O & M Costs (Including Govt. FTE):	0	0	0	$33.8
Total Cost (Including Govt. FTE):	$1.8	$103.9	$25.2	$42.3
Total Govt. FTE costs:	$1.1	$0.8	$1.3	$1.4
# of FTE rep by costs:	8	7	10	10

Total change from prior year final President's Budget ($)		$4.0	$-35.4	
Total change from prior year final President's Budget (%)		4.00%	-58.40%	

EXHIBIT 300   **UII 016-000002139**

2. If the funding levels have changed from the FY 2012 President's Budget request for PY or CY, briefly explain those changes:

SSA made the decision to buy down $50m from FY12 to FY11 so that the transition costs are obligated when the orders are placed. This accounted for the reduction in FY12 and the associated increase in FY11.

EXHIBIT 300   **UII 016-000002139**

Section D: Acquisition/Contract Strategy (All Capital Assets)

Table I.D.1 Contracts and Acquisition Strategy												
Contract Type	EVM Required	Contracting Agency ID	Procurement Instrument Identifier (PIID)	Indefinite Delivery Vehicle (IDV) Reference ID	IDV Agency ID	Solicitation ID	Ultimate Contract Value ($M)	Type	PBSA ?	Effective Date	Actual or Expected End Date
Awarded		Networx_Service_Contract									

2. If earned value is not required or will not be a contract requirement for any of the contracts or task orders above, explain why:
N/A

EXHIBIT 300   **UII 016-000002139**

Exhibit 300B: Performance Measurement Report

Section A: General Information

Date of Last Change to Activities: 2012-08-27

Section B: Project Execution Data

Table II.B.1 Projects					
Project ID	Project Name	Project Description	Project Start Date	Project Completion Date	Project Lifecycle Cost ($M)
CARE0401	FY11 CARE through 2020	Transition and Development.			
CARE0501	FY12 Transition and Development Management Resources	Contractor and Government Budgeted (SITAR) Resources as well as Engineering Support Services.			
CARE0502	FY12 Interactive Voice Response (IVR) Services	Automated Applications for SSA National 800 Number.			
CARE0503	FY12 Computer Telephony Interation (CTI) Desktop Project	Agent/Supervisor Desktop as well as Screen Pop.			
CARE0504	FY12 Management Information (MI) Reporting	Reporting system providing cradle to grave information for reviewing and improving performance.			
CARE0505	FY12 Quality Monitoring and WorkForce Mgmt	Supervisor's monitoring tool.			
CARE0506	FY12 Unified Call Center Engineering (UCCE) Call Routing	Call Flows and Call Routing supporting the Automated Applications.			
CARE0507	FY12 TeleService Center (TSC) Deployments	Includes site cut overs and training.			
CARE0508	FY12 Post-Transition Activities	Disconnection of existing services as well as ongoing operations			

EXHIBIT 300   UII 016-000002139

Table II.B.1 Projects

Project ID	Project Name	Project Description	Project Start Date	Project Completion Date	Project Lifecycle Cost ($M)
		and management support.			
CARE0509	FY12 Management Overhead O/H	Management and overhead work years are based on the total number of FTEs and Contractors allocated to this program for project-related work.			
CARE0510	FY12 Non-DCS Support	GS-2210 IT Specialists supporting major IT initiatives that work in various agency-level offices outside the Office of Systems.			

Activity Summary

Roll-up of Information Provided in Lowest Level Child Activities

Project ID	Name	Total Cost of Project Activities ($M)	End Point Schedule Variance (in days)	End Point Schedule Variance (%)	Cost Variance ($M)	Cost Variance (%)	Total Planned Cost ($M)	Count of Activities
CARE0401	FY11 CARE through 2020							
CARE0501	FY12 Transition and Development Management Resources							
CARE0502	FY12 Interactive Voice Response (IVR) Services							
CARE0503	FY12 Computer Telephony Interation (CTI) Desktop Project							
CARE0504	FY12 Management Information (MI) Reporting							
CARE0505	FY12 Quality Monitoring and WorkForce Mgmt							
CARE0506	FY12 Unified Call							

		Activity Summary						
		Roll-up of Information Provided in Lowest Level Child Activities						
Project ID	Name	Total Cost of Project Activities ($M)	End Point Schedule Variance (in days)	End Point Schedule Variance (%)	Cost Variance ($M)	Cost Variance (%)	Total Planned Cost ($M)	Count of Activities
	Center Engineering (UCCE) Call Routing							
CARE0507	FY12 TeleService Center (TSC) Deployments							
CARE0508	FY12 Post-Transition Activities							
CARE0509	FY12 Management Overhead O/H							
CARE0510	FY12 Non-DCS Support							

		Key Deliverables						
Project Name	Activity Name	Description	Planned Completion Date	Projected Completion Date	Actual Completion Date	Duration (in days)	Schedule Variance (in days)	Schedule Variance (%)
CARE0401	FY11 CARE through 2020	Transition and Development.	2011-09-30	2011-09-30	2011-09-30	364	0	0.00%
CARE0506	Unified Call Center Engineering (UCCE) Call Flow Development	Includes call flow development, configuration and scripting.	2011-12-31	2011-12-31	2011-12-30	91	1	1.10%
CARE0506	Unified Call Center Engineering (UCCE) Call Flow Testing	Includes Failover, System & Functional, and Performance/Load testing.	2011-12-31	2011-12-31	2011-12-30	91	1	1.10%
CARE0503	Computer Telephony Integration (CTI) Testing	Agent and supervisor desktop testing.	2011-12-31	2011-12-31	2011-12-30	91	1	1.10%
CARE0503	Computer Telephony Integration (CTI) Development	Desktop Development.	2011-12-31	2012-03-31	2012-03-31	91	-91	-100.00%
CARE0502	Interactive Voice Response (IVR) Testing	Includes Agency/User Acceptance Testing of automated	2012-03-31	2012-03-31	2012-03-31	125	0	0.00%

EXHIBIT 300   **UII 016-000002139**

					Key Deliverables			
Project Name	**Activity Name**	**Description**	**Planned Completion Date**	**Projected Completion Date**	**Actual Completion Date**	**Duration (in days)**	**Schedule Variance (in days)**	**Schedule Variance (%)**
		applicatations.						
CARE0504	Management Information (MI) Report Development	Includes architecture design, report design and reports training.	2012-03-31	2012-08-25		182	-153	-84.07%
CARE0501	FY12 Transition and Development Project Management Resources 1st & 2nd Qtrs	Support for the transition includes testing, remote site activities and Management Information reporting. The implementation plan requires that these activities overlap throughout FY12.	2012-03-31	2012-03-31	2012-03-31	182	0	0.00%
CARE0504	Management Information (MI) Testing	Report testing.	2012-03-31	2012-09-30		182	-183	-100.55%
CARE0504	Management Information (MI) Training	Sextant delivers MI Admin and Train the Trainer to HP & AT&T.	2012-03-31	2012-05-16	2012-04-25	153	-25	-16.34%
CARE0501	FY12 Engineering Support Services 1st & 2nd Qtrs	Engineers supporting the project schedule. The implementation plan requires that these activities overlap throughout FY12.	2012-03-31	2012-03-31	2012-03-31	182	0	0.00%
CARE0505	Quality Monitoring and WorkForce Management (QM-WF) Testing and Acceptance	SSA testing and acceptance of Quality Workforce Mgmt.	2012-03-31	2012-07-20	2012-05-25	182	-55	-30.22%
CARE0502	Interactive Voice Response (IVR) Deployment	Execute existing Call Center Network Solution (CCNS) to CARE-Net Automation Transition.	2012-05-22	2012-09-30		27	-131	-485.19%

EXHIBIT 300   **UII 016-000002139**

				Key Deliverables				
Project Name	**Activity Name**	**Description**	**Planned Completion Date**	**Projected Completion Date**	**Actual Completion Date**	**Duration (in days)**	**Schedule Variance (in days)**	**Schedule Variance (%)**
CARE0507	TeleService Center (TSC) Deployments - Group One	Includes site installation, training and site cut-over.	2012-06-30	2012-09-30		181	-92	-50.83%
CARE0507	TeleService Center (TSC) Deployments - Group Two	Includes site installation, training and site cut-over.	2012-06-30	2012-09-30		181	-92	-50.83%
CARE0507	TeleService Center (TSC) Deployments - Group Three	Includes site installation, training and site cut-over.	2012-06-30	2012-09-30		181	-92	-50.83%
CARE0503	Computer Telephony Integration (CTI) Deployment	CTI desktop will be deployed to agents as sites transition.	2012-06-30	2012-09-30		181	-92	-50.83%
CARE0501	FY12 Engineering Support Services 3rd & 4th Qtrs	Engineers supporting the project schedule. The implementation plan requires that these activities overlap throughout FY12.	2012-09-30	2012-09-30		182	0	0.00%
CARE0502	Interactive Voice Response (IVR) Tuning	Production speech application tuning.	2012-09-30	2012-09-30		182	0	0.00%
CARE0501	FY12 Transition and Development Project Management Resources 3rd & 4th Qtrs	Support for the transition includes testing, remote site activities and Management Information reporting. The implementation plan requires that these activities overlap throughout FY12.	2012-09-30	2012-09-30		182	0	0.00%

EXHIBIT 300   **UII 016-000002139**

Section C: Operational Data

Table II.C.1 Performance Metrics								
Metric Description	Unit of Measure	FEA Performance Measurement Category Mapping	Measurement Condition	Baseline	Target for PY	Actual for PY	Target for CY	Reporting Frequency
Achieve the target busy rate for National 800 Number calls	Percent	Customer Results - Service Accessibility	Under target	5.000000	6.000000	3.000000	6.000000	Semi-Annual
Achieve the target speed in answering National 800 Number calls	Seconds	Customer Results - Timeliness and Responsiveness	Under target	203.000000	267.000000	180.000000	285.000000	Semi-Annual
Percentage of successful reconnects for Scheduled Voice Callback (SVC) application	Percent	Technology - Effectiveness	Over target	96.400000	95.000000	95.400000	95.000000	Monthly
Stop the growth of caller abandons	Percent	Process and Activities - Productivity	Under target	19.300000	21.800000	20.800000	21.800000	Semi-Annual
Maintain a high availability of Computer Telephony Integration (CTI) applications	Percent	Technology - Reliability and Availability	Over target	99.850000	97.000000	99.980000	99.000000	Semi-Annual
Maintain the percent of people rating our services as "excellent," "very good," or "good"	Percent	Customer Results - Customer Benefit	Over target	78.200000	83.500000	81.400000	83.500000	Semi-Annual